DOCUMENT RESUME

ED 097 142 RC 008 145

AUTHOR	Isenberg, Robert M., Ed.
TITLE	Journal on State School Systems Development, Summer 1967, Vol. 1, No. 2.
INSTITUTION	National Education Association, Washington, D.C. Dept. of Rural Education.
PUB DATE	67
NOTE	58p.
AVAILABLE FROM	Department of Rural Education, National Education Association, 1201 16th Street, N.W., Washington, D.C. 20036 ($1.50)
EDRS PRICE	MF-$0.75 HC-$3.15 PLUS POSTAGE
DESCRIPTORS	Administrative Organization; Agency Role; Cooperative Programs; County School Systems; Education Service Centers; *Intermediate Administrative Units; Legislation; *Periodicals; School Districts; *School Redistricting; *Statewide Planning; *Systems Development; Transportation

ABSTRACT

The "Journal of State School Systems Development" is designed for the regular and orderly reporting of information and developments related to specialized school government as a system for accomplishing public educational purposes. Its issues include reports of State and Federal legislative action, program implications, special projects, and research findings as well as discussions of intergovernmental relations and specific issues. The journal serves as a source of information for persons interested in school government, its objectives, and its productivity. The Summer 1967, Vol. 1, No. 2, issue includes the following articles: (1) "Forces Affecting Local District Reorganization"; (2) "School District Unification in Kansas"; (3) "Ohio's System of Regional Coordinators for Pupil Transportation"; (4) "Developing a State Plan for Pennsylvania's Intermediate Units"; and (5) "The California Committee of Ten Report". (NQ)

BEST COPY AVAILABLE

Journal on **STATE SCHOOL SYSTEMS DEVELOPMENT**

SUMMER 1967 ■ VOLUME 1 NUMBER 2

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION
THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY.

PERMISSION TO REPRODUCE THIS COPYRIGHTED MATERIAL HAS BEEN GRANTED BY
NEA Clearinghouse
Lewis Tambolyn
TO ERIC AND ORGANIZATIONS OPERATING UNDER AGREEMENTS WITH THE NATIONAL INSTITUTE OF EDUCATION. FURTHER REPRODUCTION OUTSIDE THE ERIC SYSTEM REQUIRES PERMISSION OF THE COPYRIGHT OWNER.

85 *Local District Reorganization*

92 *Unification in Kansas*

104 *Regional Transportation Coordinators*

117 *Pennsylvania's Intermediate Units*

130 *The Committee of Ten Report*

Journal on

State

School

Systems

DEVELOPMENT

The JOURNAL is designed for the regular and orderly reporting of information and developments related to specialized school government as a system for accomplishing public educational purposes. Its issues include reports of state and federal legislative action, program implications, special projects, and research findings as well as discussions of intergovernmental relations and specific issues. It is not a spokesman for a single point of view. It serves instead as a printed forum for responsible contributors and a source of information for those concerned about school government, its objectives, and its productivity.

Editor: ROBERT M. ISENBERG, Executive Secretary, Department of Rural Education, National Education Association, Washington, D. C.

Assistant Editor: LILLIAN MAHAYNI, Department of Rural Education, National Education Association, Washington, D. C.

Advisory Board

JOSEPH ACKERMAN, Managing Director, Farm Foundation, Chicago, Illinois

WILLIAM J. EMERSON, Superintendent, Oakland County Intermediate School District, Pontiac, Michigan

CHARLES O. FITZWATER, Chief, Administrative Section, Division of State Agency Cooperation, Office of Education, Department of Health, Education, and Welfare, Washington, D. C.

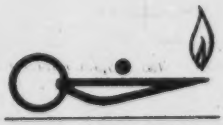
BASCOM B. HAYES, Chairman, Department of Educational Administration, University of Texas, Austin

A. JOHN HOLDEN, JR., Vice President, Education Development Center, Inc., Newton, Massachusetts

PAUL F. JOHNSTON, Superintendent of Public Instruction, State Department of Public Instruction, Des Moines, Iowa

ALEXANDER J. KLOSTER, Associate Director, Southeastern Education Laboratory, Hapeville, Georgia

WILLIAM P. MCLURE, Director, Bureau of Educational Research, College of Education, University of Illinois, Urbana



EDPRESS

BEST COPY AVAILABLE

Journal on State School Systems Development

COPYRIGHT © 1967 BY THE
DEPARTMENT OF RURAL EDUCATION
NATIONAL EDUCATION ASSOCIATION

Summer 1967 ■ Volume 1 Number 2

Contents

85 Forces Affecting Local District Reorganization
Ralph D. Purdy

92 School District Unification in Kansas
W. C. Kampschroeder

104 Developing a System of Regional Transportation Coordinators in Ohio
John M. Parsons

117 A State Plan for Pennsylvania's Intermediate Units
Paul S. Christman

130 The California Committee of Ten Report
Polly Carithers

Published quarterly by the Division of County and Intermediate Unit Superintendents, Department of Rural Education, National Education Association, 1201 Sixteenth Street, N.W., Washington, D.C. 20036.

[redacted] single issue, $1.50. Orders should be accompanied by payment; checks, payable to the Journal on State School Systems Development, should be sent to the Department of Rural Education at the above address.

Forces Affecting

LOCAL DISTRICT REORGANIZATION

Ralph D. Purdy

ONE OF THE DIFFICULT and complex problems facing society is that of providing comprehensive educational opportunities for all children no matter what their socioeconomic status or place of residence. The problem is further exacerbated by a general unwillingness to make available the funds necessary to maintain quality and excellence in the education program. More than ever, educators, citizens, legislators, and responsible leaders in state departments of education have an obligation to work together to open doors which can provide full educational advantages to all students with the maximum efficiency in operation and economy in expenditure.

It is immediately obvious that excellence and efficiency in providing educational programs are dependent upon the existence of an administrative structure which makes such characteristics attainable. Since they are not likely to be achieved in a state school system designed for the educational requirements of an earlier day, most states have given serious thought and effort to some type of educational reorganization. As yet, however, much of the accomplishment has been a reorganization of local school districts—and this process is continuing. Currently, more than twenty states are actively engaged in developing an improved local school district configuration.

While the total number of local school districts is now but a fraction of what it was two and three decades ago, the process has been both painful and slow. The following is a brief discussion of the need for continued reorganization efforts, some of

Dr. Purdy is Director for The Great Plains Project on School District Organization, Lincoln, Nebraska.

the alternative approaches which seem to be emerging, and an identification of some of the forces and factors which tend to limit or hinder the reorganization process.

WHY REORGANIZE?

Providing comprehensive educational opportunities for all children regardless of their socioeconomic status or place of residence is a tall order. It requires diversification in the educational program and a wide range of supporting services. Nor do population density or sparsity or either the conditions of economically depressed areas or those with affluence alter these requirements. With a level of mobility that takes nine out of ten people either to colleges or to places of work which are geographically different from the areas of their childhood, the task is further complicated. Young people need training opportunities sufficient to match the demands their future is likely to make upon them.

The demands on education come from many sources. Our total society has an obligation to perpetuate the ideals of mankind and to foster an appreciation for our culture and heritage. Individuals are increasingly dependent on education for much of their personal development and for the competencies and understandings essential for finding a productive and satisfying place in this society. The federal government has a major educational interest which includes its concerns for our national defense, a stable economy, and the general welfare of all our people. State governments have a legal as well as a general welfare interest. And local governments exercise delegated authority and try to build into the educational program components reflecting needs indigenous to each community. Business and industry and every other aspect of our economic life share also in this concern. Continued productivity, both for a single economic enterprise and for the nation as a whole, rests largely upon a sound educational system.

In this context, the piecemeal unification and fragmented annexations to already existing inadequate structures which have often characterized local school district reorganization efforts fall far short of what is needed. A careful appraisal of the kinds of functions school systems should provide and how these functions can best be assigned and carried out must be made a part of the reorganization process. The need is for a level of

statewide planning which has seldom yet been evident. The existing pattern of local school districts is not adequate for the efficiency and excellence demanded.

APPROACHES IN REORGANIZATION

It would be extremely useful if a well documented universally acceptable, and easily attainable set of standards regarding local school districts could be taken from the shelf and used by state and community leaders to guide reorganization. There is no "magic," however, and the research data available is varied and far from conclusive. Nevertheless there is a great deal of empirical data that can be extremely helpful in planning a more adequate local school district structure. The following are illustrative of such guidelines:

1. An elementary school attendance center should have a minimum of 200 to 250 children with not less than one teacher for each grade level.
2. For grades 9-12 or for grades 10-12, a minimum of 500 students with an approximate 1,000 optimum is recommended. Dr. James B. Conant recommended at least 100 students in the graduating class.
3. In the regular K-12 program, a pupil population base of at least 15,000 is recommended. A diversified vocational and technical program, on the other hand, probably requires an enrollment base of 100,000 or more.
4. For special education programs the recommendations vary considerably for different groups of atypical children. It is estimated that approximately 12.5 percent of the children in any given local school district may require special assistance. These special programs can range from a pupil enrollment base of 1,000 for a program to help the educable mentally retarded to an enrollment base of 100,000 or more for the economical operation of a diagnostic clinic.
5. Recommendations for research and development activities range from a base of an individual classroom through regional agencies within a state to interstate centers.
6. The National Commission on School District Reorganization recommended in 1948 that desirable local school districts have a base of at least 10,000 students. A Peabody Study, published in 1965, also recommends a base of at least 10,000 with an indication that an optimum district

might be more nearly 15,000-20,000 students.

7. The efficient use of data processing requires a minimum base of 60,000. A larger number would increase the economic efficiency of the operation. There is no recommendation regarding a possible maximum for such a center.

While such recommendations can hardly be considered universally acceptable and are certainly not easily attainable in many parts of the country, they are useful. They represent what some would consider desirable goals. In sparsely populated areas, a local school district with 15,000 to 20,000 may well seem unrealistic. Time and distance factors must be given appropriate consideration. But this does not minimize the value of the optimum recommendations where it may well be a possibility.

Two separate approaches seem to be evidenced in developments now taking place within the various states. One is the formation of local school districts of sufficient size that they will be as nearly able as possible to meet the educational needs of all pupils within the district. The second is based on the belief that it will not be possible in the foreseeable future to develop a system of local school districts of that size and that, even if it were possible, it would not be desirable. The districts so formed would be of such size geographically that people would tend to lose their feeling of having some relationship to the administration of schools. This second approach would make local school districts as large as practicable, but allocate high cost and specialized functions to some type of regional or area agency. Both approaches are observable in state reorganization efforts.

FORCES RETARDING REORGANIZATION

As state and local leaders promote efforts which will bring more adequate local school districts and, therefore, a more efficient and effective state school system, they can derive support from the educational implications of the expanding complexity and diversity of the times. As they advance a reorganization program, they are joined by those members of state legislatures who have difficulty finding justification for a school organization that tends to preclude either efficiency or excellence—especially in view of mounting educational costs.

But just as there are supporting forces, there are many which have a tendency to retard and hamper the revamping of the existing school structure. The following are among those which

tend to make reorganization progress more difficult:

1. There is a general lack of understanding on the part of a majority of citizens and among many members of the educational profession as to what actually constitutes an educational program that is both comprehensive and excellent. Most people want good schools. But when the dimensions of what is "good" are limited, the goals set are often short of what they should be.
2. Professional leadership on the part of school administrators has not always been positive. Many actually regard district reorganization as a threat to their personal well-being and their professional security. Because of their sometimes reluctant support or even opposition with regard to reorganization, there frequently develops a certain amount of confusion, misunderstanding, and mistrust among citizens, members of the state legislature, and the business, professional, and governmental leadership.
3. Fear underlies many of the problems hindering school district organization—fear of losing local control, fear of increased costs, fear of increased taxation, and fear of losing community identity.
4. Many citizens tend to find security in the successful and traditional experiences of the past. "If it was good enough for my parents, it is good enough for me and for my children." This tendency to look backwards is often very real, although it tends to be a verbalization rooted in something much more basic and tangible.
5. Pride in our homes, in our communities, and in our schools is a national characteristic and part of our heritage. School pride is often cultivated—"our school is the best" —regardless of how strong or how weak it may be. This pride, promoted by parents, pupils, teachers and administrators, has its value, but it tends to blind against reality.
6. State reorganization laws and procedures are often cumbersome and inadequate. More progress could be made if some of the stumbling blocks were removed and the laws made more realistic.
7. State boards of education are sometimes reluctant to take the needed corrective action. Many have authority and the responsibility for developing effective and adequate school district organization but have failed to adopt or to enforce adopted policies.

8. Many people fail to differentiate between a school district and a school attendance center. They tend to equate the formation of a larger administrative unit with a single school. On the basis of this misunderstanding, all kinds of dire consequences are associated with the reorganization proposal. While some amount of school consolidation actually does accompany many reorganization efforts, reorganization and consolidation are not the same thing.
9. Much of the reorganization of past years has fallen short of establishing truly adequate school districts. Yet, once a community has accomplished some reorganization, the tendency for most citizens is to assume their reorganization task is completely finished. They do not look kindly on the suggestion that they undertake the procedure all over again.
10. Differences in the legal framework of different political jurisdictions are frequent deterrents to reorganization. Some types of political units may levy a local sales tax or other special tax. To join with such a unit a neighboring district not having a similar tax, or not having authority to levy such a tax, automatically creates an inequity in the tax base. Some school districts are fiscally dependent upon some other local governmental body. To combine such a district with one that is fiscally independent poses similar jurisdictional problems. Different assessment levels have the same retarding effect unless effective equalization procedures are employed.
11. Many parents and school board members resist reorganization not only because of the likelihood of additional costs, but because, in many areas, the increased distance necessary to transport the children and the amount of time required to ride a school bus are more than desirable.
12. Political leaders are inclined not to give school district reorganization the kind of aggressive support it usually requires. There are varying reasons for the lack of aggressive support needed. Some of those seeking elective positions are extremely cautious about a platform that may increase taxes. Others tend to propagate a type of localism that regards the restructuring of school districts as a distinct trend toward centralization and collectivism.

SUMMARY

How well any state or community measures up to meeting its educational responsibilities is dependent to a very great extent upon the type and adequacy of its basic school administrative units and such other organizational components as may be a part of the state school system. Over several decades there have been some substantial changes in state structure, especially reorganization of local school districts. Much more is needed and efforts toward this objective are continuing. The counterforces also at work make school district reorganization a highly controversial subject in many communities and nearly all those concerned and involved tend to have strong feelings.

But education is too important to our survival, our productivity, and our ability to make life a rewarding and satisfying experience to settle for recognized inadequacy. The direction must be forward. Statesmanship and persistence will be required.

Abstracted Separately as
ED 017352

BEST COPY AVAILABLE

School District

UNIFICATION IN KANSAS

W. C. Kampschroeder

KANSAS LED the nation in reducing the number of local school districts during 1965 and 1966. A news release issued by the U.S. Office of Education on December 22, 1966 calling attention to the fact that "the nation is educating more and more children in fewer and fewer school districts" cited Kansas for its achievement—the reconfiguration of local school organization "from 1,500 to 349 districts" in a single year. This major organizational overhaul was the result of the passage of the Unification Acts of 1963 and 1965. The nature of this legislation is described later in some detail. But first, to understand and appreciate what Kansas has been able to accomplish, a brief review of some of its educational history may be helpful.

DISTRICT PATTERN DEVELOPMENT

The basic pattern for the development of school district organization in Kansas was established before admission of the territory into the Union in 1861. This development had its roots in the system of common school districts that county superintendents began organizing in 1858 and it was not surprising, therefore, that this pattern was written into the state's first constitution. Basically, this constitution provided that a system of schools be organized, supervised, and maintained by the state. It also provided for a state superintendent, a county superin-

Dr. Kampschroeder is the Superintendent of Public Instruction for the State of Kansas. *He acknowledges the assistance of Adel F. Throckmorton, former state superintendent, and George Keith, Director of the Section on School District Organization, State Department of Public Instruction, in preparing much of the material on which this article is based.*

tendent for each county, and a mandate to the legislature for "establishing a uniform system of common schools and schools of higher grade." Each county superintendent was responsible for dividing his county into a "suitable number of school districts" and, on approval of the board of county commissioners, to change the boundaries of such districts when desirable.

The 9,284 school districts that had been created in Kansas by 1896 did meet the general educational needs of a pioneer society in which academic achievement was secondary to wresting a living from the soil. Each small cluster of settlers brought in a school teacher, and there was usually a separate school district for each one-teacher school. Because families tended to be large, the geographic area served by each one-teacher school could be limited. The schools were, in nearly every instance, within walking distance for the boys and girls who attended. This close physical relationship, coupled with such social activities as ciphering matches, box suppers, spelling bees, and community sings which also took place in the schools, caused the schools to become community centers. Under these conditions there developed a sentimental attachment to the one-teacher school that kept them in operation long after the educational and economic welfare of the state demanded a new organizational framework. Their persistence can be illustrated by the fact that 8,142 common school districts were still legal entities as recently as the 1942-43 school year.

It is significant that the pattern of school district organization, just described, as it developed throughout the state, provided only elementary education programs. With respect to high school education, the development pattern was substantially different. Acknowledging the existence of a few earlier church or college related academies, the first public high schools in Kansas were those established in first-class and second-class cities under a law adopted in 1876. Some relatively unproductive legislation regarding the establishment of high schools followed: a Township High School Law passed in 1881, a County High School Law passed in 1886, and a County Seat High School Law passed in 1897. Probably more important to the development of public secondary education than any of those measures was legislation passed in 1889 authorizing elementary school districts to pay the tuition of pupils attending high school. The seed was planted to unify the elementary and secondary systems under one administration.

Developments during these early years were exceedingly slow, and much of the territory of the state continued not to be included within the boundaries of any organized high school district. Most of the laws which had been adopted failed to include adequate provisions for financing high school operation. To rectify this situation, the Barnes Law of 1905, optional with any county, provided a means for countywide financial support for high schools. This law, together with the County High School Tuition Law of 1915, authorizing the organization of high school districts with any boundaries the respective communities might decide upon as long as the district included 16 square miles or more, made it possible for every child in Kansas to have access to a high school education without the payment of tuition. Only then was there a rapid extension of high school education throughout the state.

In 1923 the Community High School Law replaced the County High School and County Seat High School Laws enacted prior to the turn of the century. Put into effect in 23 counties, it provided for a countywide levy on all territory not already within an organized high school district to support a county or community high school which could be attended by pupils residing within that territory. While some of the more than 300 rural high school districts that were organized had boundaries crossing county lines, in a few instances including territory from as many as four counties, most of these high school districts were small and financially weak. This led to a provision in 1925 requiring all rural high school districts subsequently formed to have an assessed valuation of at least $2,000,000.

Although only a few highlights of Kansas' early school legislation and its relationship to the development of school districts throughout the state have been indicated, they may be sufficient to point out how an educational framework with identifiable characteristics and weaknesses can evolve. Understanding them is basic to an understanding of the school district reorganization efforts the state has recently experienced. The major characteristics of school organization as it developed in Kansas might be summed up in the following broad general statements:

1. *The organizational pattern for providing education was made up of a large number of extremely small school districts.* The 2,794 school districts existing in 1958 had an average enrollment of 158 pupils. That year the 1,909 districts providing only elementary education had an aver-

age enrollment of 70 pupils; the 330 districts providing only high school education had an average enrollment of 129 pupils. Reports in the Department of Public Instruction show that during the 1955-56 school year, nearly 600 elementary districts had enrollments of fewer than 10 pupils while 106 high schools had a total enrollment of 35 or fewer pupils.

2. *The state system was made up of separate elementary school districts with a separate set of overlapping high school districts.* Elementary schools and high schools operated as separate units under separate boards of education with non-coterminous boundaries. In 1958 only 237 of the state's 2,794 school districts operated both an elementary and a high school program. This double deck or two-story system of districts caused numerous special tax and finance problems, a lack of articulation between the elementary and high school programs, and a general absence of ability to use specialized facilities and personnel economically.
3. *The state system was composed of many different kinds of school districts operating under different laws.* The "uniform system of schools" prescribed by the constitution was far from a reality. Various types of districts operated high schools (city, village, consolidated, community, rural) with varying methods of support (Barnes counties, tuition counties, community high school counties, special counties). By 1961 there had been created no less than 18 different kinds of school districts as to organization or function calling for an ever-increasing number of special laws to enable such a variety of systems to operate. An identification of the number of each of the different kinds of school districts as they existed in 1963 is given in Table 1.
4. *No direct administrative authority for school district organization was vested in the State Department of Public Instruction or in the State Board of Education.* Neither the State Superintendent of Public Instruction, a position provided for in the constitution, nor the State Board of Education, a body established by law in 1915, had any direct control over school district organization or reorganization. There was a legal provision which permitted certain problems concerning the organization of districts extending across county lines to be appealed to the state superintendent but, generally, his role and that of the

State Board were limited to the administration of statutes rather than exercising discretionary authority.

EARLY REORGANIZATION EFFORTS

A thread of concern for modifying the existing school district structure has existed in Kansas throughout its history as a state. Legislation enacted in 1861 made provisions whereby the people in one-teacher districts could, by popular vote or by petition to the county superintendent, form a "union" or "graded" school district with two or more teachers or unite to maintain a one-teacher school serving a school district area larger than had existed previously. Some consolidations were accomplished under this legislation but the major development during these early years of statehood was the rapid formation of additional districts, most of them small.

By 1890 the immigration of settlers had lessened considerably and some areas of the state were experiencing substantial population shifts and out-migration. In response to such circumstances, laws were passed in 1893, 1895 and 1899 to permit the disorganization of depopulated districts, but these laws were barely used. The first real attempt at reorganization was the consolidated school movement which began in 1901. Legislation enacted that year provided for the creation of a "consolidated district" by uniting several small one-teacher school districts to maintain a graded school or to maintain a graded school and a high school. A number of consolidated school districts were formed under this law, particularly in the more sparsely populated western part of the state. While only two consolidated districts were reported in 1902, by 1914 there were 80. But this effort was short lived. Most of these newly formed districts required the issuance and passage of school bonds and the construction of new school buildings. Since virtually all school costs were at that time borne locally, the consolidated school quickly became synonymous with excessive costs. Consolidation became a word that caused short tempers and high blood pressure and opposition to this permissive law was such that the most significant result of the entire consolidation movement was a delay of much needed reorganization for many years.

That people in Kansas actually did recognize the inadequacy of the school district structure is evident from a different kind of statewide movement—the closing of schools. Many districts

found it more economical simply to close the doors of their school and transport their children to a school district nearby. While this practice began before 1900, it gained in momentum during the late 1930's. In 1939 more than 1,000 of the state's legally constituted school districts were no longer operating a school. Some of these districts had sold their school building indicating little intention of maintaining a school again. By 1945 more than 2,500 districts had closed their schools and a survey, made in 1942, showed that more than 10 percent of these had remained closed for at least ten years. It is interesting to note that very few pupils from these closed districts were sent to the neighboring one-teacher districts. Most were transported to the small towns where, it evidently was believed, the children would receive a sounder education.

Other evidences that the need to reorganize school districts was recognized are found in official reports and documents. The Governor's Commission of 1907 and the State School Code Commissions of 1921-22 and 1927-28 proposed substantial reforms in the school district structure. Little resulted, however, from these recommendations.

MORE RECENT DEVELOPMENTS

The first major attempt to correct some of the inadequacies of the school district system was made by the legislature in 1945 by enactment of legislation requiring all elementary districts to be reorganized. The law provided that the county commissioners appoint a county school reorganization committee in each county. The committee's functions were to disorganize all nonoperating districts, complete a countywide school survey, and work out a reorganization plan adapted to the particular needs of the county. After hearings were held on the reorganization plan and the plan was modified accordingly, these reorganization committees were authorized to issue orders establishing the new districts. No approval or review by any state administrative agency was provided in this reorganization legislation.

A storm of protest quickly erupted. All public officials in anyway connected with this reorganization law or its implementation were attacked by an irate citizenry. Among those subject to harassment and abuse were legislators, county committees, county superintendents, and the state superintendent. Two state senators were sent letters threatening death unless they gave

their support to changing the law. It was amended in 1947 to help offset some of the earlier bitterness aroused by setting up a procedure whereby any county in which a majority of the local school districts desired to do so could elect a county reorganization committee to replace the one appointed by the county commissioners under provisions of the original law.

The real test of this reorganization law was to come in the courts, however. A number of suits were filed and in 1947 the Kansas Supreme Court ruled the acts of 1945 and 1947 unconstitutional because of the unrestricted discretion delegated to the county school reorganization committees. This decision brought all reorganization efforts, well underway in most of the counties, to an abrupt halt.

In spite of the resistance, the uproar, and the pervading atmosphere of mistrust, much was accomplished under this legislation. During the approximately two years the law had been in effect, 3,700 school districts had been either disorganized or had experienced boundary changes. Further, the 1947 legislature, following the court decision, passed validating acts making all of those districts formed through reorganization valid, legal districts. Approximately one-third of the districts existing before the 1945 legislation was enacted had been eliminated.

The general pattern of too many too small districts remained prevalent, however, and the situation became more critical as the population continued to move from the rural to the urban areas. As recently as 1960, 255 of the state's 552 public high schools operated with enrollments of less than 75 students. Eighteen of this group maintained a high school for less than 25 students. A disguised factor in perpetuating these inadequate districts was due to the state's school finance laws which facilitated their existence rather than provide financial and other incentives to consolidate. These obsolete laws, designed for a rural dominated society, also discriminated against the schools in the urban areas.

In an attempt to bring about a more efficient school structure, the 1961 legislature enacted another district reorganization law for the purpose of creating unified districts. But those who opposed any kind of realignment of districts exerted so much pressure that the bill as introduced was emasculated and, in a test case, declared by the Supreme Court to be unconstitutional on the same grounds that invalidated the 1945 legislation. No district reorganization was completed under this act.

NATURE OF THE UNIFICATION LEGISLATION

In 1957, the Kansas Legislature authorized a comprehensive survey of education in the state and in March of 1960 the report was presented to the Legislative Council. Largely, as a result of this survey and based upon its recommendations, the 1961 legislature enacted the ill-fated school district unification law referred to above.

By 1963 most legislators were determined to enact a sound reorganization law that would be constitutional. The Attorney General and other attorneys worked closely with legislators to insure that the bill as enacted would stand the court tests that were certain to ensue. The law provided for incorporating all territory of the state in a school district that offered instruction from grades one through twelve with authority to operate a kindergarten and, under certain conditions, a junior college. The role assigned to the state superintendent under this 1963 Act gave him considerable jurisdiction, contrary to the role given him under the 1945 and 1961 legislation. In order to insure constitutionality, every significant procedure in the reorganization process required either the state superintendent's decision or approval, including action taken by the county planning boards and, in some instances, the results of elections.

Unification procedures progressed under the time schedule provided in the law, but problems and inequities that could not be foreseen in 1963 had to be adjusted by amendatory legislation in 1965. As the process of reorganizing districts moved forward, it brought upon the state superintendent a storm of vilification and abuse for which there is no recorded parallel. So much authority had been delegated to him that leaders of organizations struggling to maintain school district *status quo*, citizens with sentimental attachment to schools that had outlived their effectiveness, and outraged taxpayers who would be required to pay an equitable, and, in most cases, an increased share of taxes under the new type of district organization, leveled their campaigns against the state superintendent as though he had enacted the legislation by dictatorial edict.

Numerous lawsuits were filed against the state superintendent in an attempt to obtain rulings from the Supreme Court that would invalidate the statutes under which unification activities were authorized. Because this fate had befallen the 1945 and 1961 Acts, there was widespread belief that the 1963 and 1965

legislation would be thrown out also. However, all of the numerous court cases attacking unification were upheld.

FINALLY SUCCESSFUL

The Unification Law of 1963 as amended in 1965 provided a basis for major improvement in the school district system in Kansas. In carrying out its provisions, all of the territory of the state was divided into planning units—one planning unit for each county except Johnson County, which had two. In all there were one hundred and six planning units.

The next step was the organization of a Selection Committee for each planning unit. These committees were composed of one board member in each school district in the unit. Members of Selection Committees had been named on or before June 1, 1963 and each committee was required to hold at least one meeting on or before June 15, 1963. It was the function of these committees to develop and recommend a plan for school district unification to the state superintendent.

If the state superintendent's approval of the recommendations of the planning committee was given by May 1, 1964 an election was held in the planning unit on the first Tuesday in June of 1964 for approval by the electors. In this election, residents of city districts voted separately from those in the rural areas. Final approval of the recommendations of the planning board required a favorable vote in both areas.

A second election was held in September 1964 for consideration of the recommendations that were not received and approved by the state superintendent in time for the June election. In planning units where recommendations were defeated in the June elections, the planning boards had the opportunity to modify their recommendations and resubmit them, first to the state superintendent for his approval, and then to the electors in the September 1964 election.

In planning units where recommendations were not approved in either the June or the September elections, or if the planning board did not submit a recommendation, the planning board and the state superintendent were required to prepare separate reports to the Legislative Council on or before November 19, 1964 stating the cause of failure to receive voter approval.

If the planning board recommendations were approved in

either the June or the September election, the state superintendent was required to issue an order organizing such unified district or districts effective on January 1, 1965 for limited purposes as specified in the Act, and for all purposes on July 1, 1966.

After October 1, 1964, any district operating a high school was able to petition the state superintendent for the establishment of a unified school district. The petition could include additional territory subject to certain limitations.

In 1965 two more unification laws were enacted. While they were designed primarily to refine the 1963 Act and to facilitate transition to unified district operation, two sections of this additional legislation have special significance. One section made it possible for certain unified districts to advance the effective date for operation for all purposes from July 1, 1966 to July 1, 1965 and 73 of the 304 unified districts took this step. The second section required the state superintendent to attach all nonhigh, nonunified territory to unified districts prior to May 1, 1966.

A graphic summary of what was accomplished by the procedures described can be derived by comparing the data presented in the following tables which show the number of school districts in the state before and after unification.

Table 1 lists the number of the various kinds of school districts existing in Kansas in 1963. Obviously, this proliferation of different kinds of school districts made school legislation and state-level school administration very complex and difficult. Table 2, by comparison, lists the kinds of school districts in existence in Kansas four years later and the number of each.

The reduction of districts and the total number of districts indicated by these tables is very significant. Perhaps most amazing is the fact that this was accomplished as a result of legislation which had neither mandatory provisions for reorganization nor financial incentives.

GENERAL OBSERVATIONS

Though some may claim that unification has been achieved in Kansas on a voluntary basis, many people in the state have a different opinion. When the recommendations of a planning board were defeated in the June and September elections, unification was far from a dead issue in that particular planning unit since, as stated earlier, the board of a district operating a high school

TABLE 1

KINDS OF SCHOOL DISTRICTS IN 1963 AND THE NUMBER OF EACH

KIND OF DISTRICT	NUMBER ORGANIZED
Cities of the First Class	13
Cities of the Second Class	84
Unified	5
Common School, Elementary and High	146
Common School, Elementary Only	753
Common School, Grades 1-9	2
Common School, One Teacher	330
County Board of Education	1
Fort Leavenworth Board	1
Johnson County Special	11
Sedgwick County Special	8
Rural High School, Regular	267
Rural High School, Russell Plan	12
Rural High School, Grades 7-12	3
Sedgwick County Special High School	1
Community High School	20
Closed Common School Districts	169
Closed Rural High School Districts	14
Total Number of School Districts	1840

TABLE 2

KINDS OF SCHOOL DISTRICTS IN 1967 AND THE NUMBER OF EACH

KIND OF DISTRICT		NUMBER ORGANIZED
Unified Under Special Legislation		2
Greeley County Unit		1
Unified Under Acts of 1963 and 1965		305
Nonunified Districts:	Rural High School	8
	Common School	26
	Second Class Cities	1
Total Districts in Kansas		343

could petition the state superintendent for the establishment of a unified district. The law permitted a petitioning rural high school district to include a maximum of ten additional square miles in the petition, and city districts were allowed to include their trade territory. Some city district petitions were approved that included up to 1,000 additional square miles. Because of these provisions in the law, many district boards, while not particularly desiring to petition, felt compelled to do so to protect their district boundary lines. This was an important factor contributing to the success of unification in Kansas. Not only did it encourage districts to petition, but unified districts so organized proved as adequate as those organized by election. In some cases as many as 25 districts were disorganized in the establishment of a single unified district by the petition method.

Without minimizing the progress that has been made in Kansas, there is still much to be done. Many of the small rural schools have been closed and during the past school year the state had sixty-six fewer high schools than were in operation a year earlier. This is progress. On the other hand, a number of the new unified districts do not have enough students or valuation to provide quality education. Several unified districts have fewer than 200 children in grades one through twelve. These districts frequently find it difficult to attract capable teachers since the current teacher shortage makes it possible for teachers to be selective and independent. In one unified district there are approximately 275 high school children scattered in four separately operating high school buildings, one with only 22 students and another with only 14.

Still, much has been accomplished. Although most of the unified districts have operated only one year, many are now providing kindergarten for all eligible children within their boundaries, and many have school nurses, teachers in special education, remedial reading teachers, full-time counselors, and other specialists for the first time. Had it not been for the shortage of qualified personnel in these specialized fields and the restrictions imposed on districts because of the state foundation finance law in its present form, more could and, no doubt, would have been accomplished.

Kansas' official motto is *Ad Astra per Aspera* "to the stars through difficulties." It appropriately describes the struggle for unification—a struggle that really began about the same time Kansas became a state.

Ohio's System of

REGIONAL COORDINATORS

For Pupil Transportation

John M. Parsons

A UNIQUE organizational pattern was introduced in Ohio during the 1966-67 school year. In simplest terms it might be described as the establishment and operation of thirty regional offices of the State Department of Education, limited exclusively in their functions to the administrative coordination of school bus operations and the transportation of children. Through this action, positive and direct, the state was able to avoid what seemed almost certain to become a chaotic situation.

NEW LEGISLATION ADOPTED

Programs for transporting children attending the public schools of Ohio had grown steadily since 1898 when the use of tax funds for this purpose was first authorized by the state legislature. Year by year the number of children transported, the number of school buses required, and the amount of funds expended for this service had increased. Aided by annual preschool round-ups and school census reports, local school districts had been able to anticipate their needs, plan appropriate routes for their school buses, and secure such additional buses and bus drivers as their growing enrollment required. Because the growth was reasonably gradual, most of the local transportation operations were able to absorb the additional responsibilities without any major difficulties.

Mr. Parsons is Director, Division of School Finance, Ohio Department of Education, Columbus.

In the fall of 1965, however, Ohio's General Assembly enacted legislation which was to change public school transportation completely. After years of internecine struggle, this legislation legalized the spending of tax monies for transporting pupils attending nonpublic schools. Heretofore, only public school pupils had received publicly financed transportation. Following are excerpts from the newly adopted Section 3327.01 of the Ohio Revised Code:

> In all city, exempted village, and local school districts where resident elementary school pupils live more than two miles from the school . . . which they attend, the board of education shall provide transportation for such pupils to and from school except when, in the judgment of such board, confirmed by the state board of education, such transportation is unnecessary or unreasonable.
>
> In all city, exempted village, and local school districts the board may provide transportation for resident high school pupils to and from the high school . . . which they attend.
>
> When transportation of pupils is provided the conveyance shall be run on a time schedule that shall be adopted and put in force by the board not later than ten days after the beginning of the school term.
>
> The cost of any transportation service authorized by this section which is in excess of the cost of transporting pupils attending public schools shall be paid first out of federal funds, if any, available for the purpose of pupil transportation, and secondly out of state appropriations.
>
> No transportation of elementary or high school pupils shall be provided by any board of education to or from any school which in the selection of pupils, faculty members or employees, practices discrimination against any person on the grounds of race, color, religion, or national origin.

The significant change in the legal language was the phrase "*which they attend.*" The Code had previously contained the phrase "*to which they are assigned.*" However slight this change in wording might seem, its legal interpretation and intent were to make *all* school children—public, private, and parochial—eligible for transportation to and from whatever school they

desired to attend providing other conditions in the law were met. The local public school district in which each pupil resides was made the responsible agency for providing the necessary transportation.

While actual determination of what might be judged "unnecessary and unreasonable" was left to the State Board of Education, it had become obvious to the General Assembly during the hearings on this legislation that many problems would need to be resolved in implementing the new law. Pupils eligible for transportation included those attending a nonpublic school located in a district other than the one in which they reside. This suggested the possibility of school buses from a number of different districts converging on a single nonpublic school. It suggested also a circumstance where the school buses of a single district would fan out to serve all the nonpublic schools considered "within a reasonable distance." Further, the possibility of such ordinary but awkward matters as a lack of uniformity in school calendars and daily time schedules among the public schools of an area and between the public and nonpublic schools suggested additional management problems. A high order of interdistrict planning seemed essential. It appeared to be the only way to avoid mass confusion and inefficiency.

Thus, aware of what might result from the new transportation requirements they were adopting, the General Assembly created what has become Section 3327.011 of the Ohio Revised Code. The following is a partial quotation from this section:

> The state board of education shall appoint for each county or for each group of counties as designated by the state board, a coordinator of school transportation to assure that each pupil . . . is transported to and from the school which he attends in a safe, expedient, and economical manner using public school collection points, routes, and schedules.
>
> . . . The boards of education within the county or group of counties shall recommend to the coordinator of transportation, routes, schedules, and utilization of transportation equipment. The coordinator, upon receipt of such recommendations, shall establish transportation routes, schedules, and utilization of transportation equipment, following such recommendations to whatever extent is feasible. The appeals from the determination of the coordinator shall be taken to the state board of education.

The effective date for extending transportation service to include nonpublic school students provided by law was August 15, 1966. This gave the State Board of Education a few months of lead time to prepare for this expanded responsibility. An additional task was that of developing a system of coordinators of pupil transportation. The following sections of this review are descriptive of how these assignments were met.

PLANNING THE COORDINATOR PROGRAM

Establishing realistic guidelines and employing the staff necessary to carry out the intent of the new law were tasks delegated to the State Board of Education. With the assistance of staff members in the Department of Education, they undertook defining the role of the newly created coordinators of school transportation. This produced an outline of the purposes, objectives, and responsibilities for those who would be employed in these positions and established qualifications for use in the selection and recruitment of personnel. The following are the outlines developed and adopted:

Purposes

1. Assure that each pupil is transported to and from the school which he attends in a safe, expedient, and economical manner using public school collection points, routes, and schedules.
2. Administer the Rules and Regulations adopted by the State Board of Education pertaining to the Revised Code.
3. Administer the school transportation policies of the State Board of Education.
4. Provide services to local boards of education relating to school transportation.
5. Guarantee equality of service.
6. Obtain and disseminate, through proper channels, information relative to school transportation.

Objectives

1. Safety
   —Promote transportation programs that will afford the maximum amount of safety for all school children.
   —Promote safeguards for walk-in school children.
   —Encourage school districts to provide safety programs

and materials for students, bus drivers, other school personnel, and the general public.

—Examine all phases of school transportation programs to see if this objective is being met.

2. Economy
   —Promote transportation programs that incorporate sound economic principles.
   —Promote high quality transportation programs that do not violate safety, adequacy, equality, and efficiency.
3. Adequacy
   —Promote transportation programs that meet the needs of public and nonpublic school programs as well as the needs of the children involved.
4. Efficiency
   —Encourage school districts to incorporate proven methods of transportation, provide proper use of equipment and manpower, and expend federal, state, and local funds in an efficient manner.

Responsibilities

1. Assist by providing instruction through in-service training programs for better transportation supervision.
2. Carry out the objectives of school transportation by assisting school officials in planning and policy-making procedures.
3. Serve as coordinator between public and private school officials and between educational and noneducational agencies.
4. Assist school transportation officials in maintaining good relations with the public.
5. Serve as liaison between school districts and the Department of Education.
6. Assist in establishing and maintaining proper relations between the operation of school transportation and the total educational program.
   —School transportation is an integral part of the educational program and has a direct bearing upon the quality of education.
   —School transportation should be consistent with the educational philosophy.
7. Assist in Providing Safety Instruction.
   —Transportation facilities and personnel should be made

available to the classroom teacher for safety instruction.
—Student safety assemblies should be conducted to develop good safety attitudes.

8. Assist in organizing and conducting school bus driver training programs.
9. Assist in interpreting and applying the Rules and Regulations of the Ohio Department of Education.
10. Assist in interpreting and applying the minimum standards of school bus design and construction.
11. Audit school transportation reports for Foundation Program reimbursement.
12. Assist boards of education in the purchase of school buses.
13. Assist school officials in determining eligibility of students for transportation.
14. Assist school officials and Highway Patrol in organizing school bus inspection.
15. Assist school officials in developing school bus maintenance programs.
16. Assist school officials in organizing school bus routing and scheduling programs.
17. Assist school officials in the analysis of school transportation finance.
18. Assist school officials in the development of school transportation policies.
19. Conduct research studies for district school officials and the Department of Education.
20. Advise the Department of Education in revising and upgrading school bus standards and regulations.

Qualifications

1. Education and Experience
   —Graduation from an accredited college or university with major courses in education.
   —Bachelor degree and four years of experience in teaching, supervision, or administration.
   —Master degree and two years of experience in teaching, supervision, or administration.
2. Essential Knowledge, Abilities, and Skills
   —Extensive knowledge of educational principles and methods.
   —Extensive knowledge of school district organization and administration.

—Extensive knowledge of school finance and school law.
—Extensive knowledge of school and community relations.
—Ability to assist in the planning and execution of a statewide program of pupil transportation.
—Ability to cooperate with local school units in organizational and promotional work.
—Ability to apply analytical thinking and sound judgment to an area of operational planning.
—Ability to organize and promote in-service education programs in the field of school transportation.
—Ability to speak before an audience.
—Skill in demonstrating effective methods of planning and evaluating school transportation programs.

ESTABLISHING REGIONAL AREAS

Having developed reasonably satisfactory job descriptions and a set of realistic qualification requirements, the task of planning workable regional areas for the coordinators was begun. Some guidance had been specified in the law in the sense that a coordinator would be assigned to work "in each county or group of counties." This provided a starting point.

Ohio has eighty-eight counties. As data for these counties was studied, differences regarding the transportation responsibilities which would need to be met were clearly identifiable:

—Some counties have one or more large city which, combined with the surrounding suburbs, constitutes a large metropolitan area.
—Some counties have no large city and are sparsely populated. These counties tend to have fewer schools and fewer children to be transported. They can also be characterized as having a larger proportion of their students requiring transportation.
—A majority of the nonpublic schools and the children who attend them are concentrated in the metropolitan areas. Few children in the more sparsely populated counties have access to a nonpublic school.

By using information regarding the numbers of children attending both the public and nonpublic schools together with the location of these schools and the number of children transported, a regional approach to coordinator areas was developed. Thirty coordinator regions were established. Eleven of these regional

areas represent a single county. The others range from a two county area to two regions which include six counties. See Figure I.

GETTING THE PROGRAM UNDERWAY

The many weeks spent in describing how a statewide program of transportation coordinators might work, establishing guidelines for the operation, and designating the specific counties and groups of counties which seemed to be workable regional areas proved a most valuable investment of time as the implementation process moved forward. Four coordinators were employed in February 1966. Their initial assignment was to assist other Department of Education staff members in planning the content and activities to be included in a training and orientation program required for all coordinators before going into the field to implement the new legislation.

During the months of March and April 1966, a total of thirty-three additional men were employed as coordinators of pupil transportation, bringing the total to thirty-seven men. In some regions it seemed that it would be necessary to have two or more men; other regions would be staffed with a single coordinator.

Before the coordinators began their duties in the field, they were involved in an intensive five-day training program. The thirty-five hours of instruction they received gave emphasis to three major areas: (a) the provisions of all pertinent sections of Ohio law, (b) the technical knowledge of the job responsibilities of a transportation coordinator, (c) the professional attitude necessary to work with local school officials. Each coordinator was provided with a handbook containing comprehensive information and reference material to help him get started on the job, and to provide direction in working with local school officials.

It is not possible to estimate the values which derived from the week-long training session which preceded assignments to the field offices. All thirty-seven coordinators together with other state department staff were involved. While each man was experienced in terms of school operation, all were new men on a new job. All had been carefully selected for the role they were to play in implementing the new legislation. That the program would be successful was evident in the enthusiasm, eagerness, dedication, and cooperation which characterized each coordinator.

BEST COPY AVAILABLE

FIGURE I—TRANSPORTATION COORDINATION REGIONS IN OHIO

Note: Regions 1 through 11 are single county regions. All other regions contain 2 to 6 counties.

The relationships of the coordinator with the local school officials in each of the regions served were considered to be crucial in making this program work successfully. Consideration of this area emphasized the following steps:

1. Contact all public and nonpublic school administrators to assure them of his desire to assist each school district implement the new legislation.
2. Arrange and conduct countywide meetings to include all school administrators.
3. Bring all public and nonpublic school administrators together to discuss and plan procedure.
4. Discuss the guidelines for eligibility of nonpublic school children as outlined by the State Board of Education.
5. Outline the methods by which the necessary data on nonpublic school children could be secured and forwarded to the proper public school district.

The sizeable task of securing suitable office space for each of the thirty regions was lessened immeasurably by the cooperative efforts of many county boards of education and county superintendents of schools who agreed to provide the office space a coordinator would need. In other regions, it was necessary to establish offices by leasing space wherever it was available from private agencies. A secretary was also employed for each regional office to handle the clerical duties and other functions. By May 1, 1966, every regional office was established and the coordinators were on the job.

During the weeks which followed, a series of personal contacts and countywide meetings were held throughout the state in each regional area. The coordinators worked with local school administrators in identifying and locating all the nonpublic school children and in determining their eligibility for transportation service. Meetings were held to work out details with regard to daily time schedules and school bus routing schedules. There were meetings with school boards to clarify any misunderstandings about local district responsibility, with PTA's, citizen groups and others interested in information about the new legislation and how the transportation service would work. Throughout the summer months the coordinators seemed to be everywhere.

As the schools opened in September, most boys and girls were being transported with such apparent ease and smoothness to their respective schools that legislators and school authorities

were laudatory about the way the new law had been implemented. When the first reports were tabulated early in November 1966, they showed that a total of 129,457 nonpublic school pupils were being transported to and from school each day. When this group was added to the public school pupils being transported, the total number of Ohio children receiving transportation was well over 1,000,000.

Following the opening of school, the coordinators conducted an additional series of meetings with nonpublic and public school administrators to tackle and resolve any of the special problems which seemed to exist. They also assisted in nearly all school districts to make adjustments in routes and daily time schedules as seemed to be desirable. Complaints and disagreements regarding application of the law were mediated wherever possible, and advice and assistance given to both public and nonpublic school officials on matters of transportation policy and finance.

EXPANDING COORDINATOR SERVICES

Throughout the school year, teams of coordinators worked with school officials to conduct complete and detailed studies of the transportation routing and scheduling system. Each of these studies required from five to ten working days to complete and each coordinator devoted a minimum of forty working days during the year to routing and scheduling surveys. The increase in operating efficiency resulting from these surveys has been substantial. Based upon 110 completed surveys, the coordinators were able to help local districts average a reduction of three buses per fleet, increase carrying efficiency by twenty-six pupils per bus, reduce pupil riding time, decrease annual transportation costs of $4.88 per pupil and eight cents per mile, and reduce the capital outlay for the purchase of buses an average of $15,683 per local district.

In addition to their activities related to routing, scheduling, and the utilization of buses, the coordinators worked with some extremely difficult problems resulting from the consolidation of school districts and from the loss of operating funds due to school levy defeat. Some of the coordinators were called upon and contributed skillfully in the amicable mediation of bus driver grievances.

Other duties were also assigned to the coordinators. The en-

tire group was involved in an intensified thirty-hour school bus driver training program which qualified them to train bus drivers and bus driver instructors. They took on this function. They were assigned responsibility also for analyzing the school bus accidents in their regional area. This analysis is used to identify the frequency and causes of different types of school bus accidents. With such information, school officials can take appropriate preventive care. The coordinators also served as resource persons, speakers, and program developers for countywide bus driver safety meetings held in each county of the state.

During the year the coordinators assisted local school officials in the purchase of 1,311 buses, including 871 buses under the cooperative state bid program. This assistance, involving uncounted hours, helped to establish the need for buses and the preparation and filing of applications and purchase orders. All buses purchased under the cooperative state bid plan were inspected by the coordinators to insure that all equipment ordered had been delivered. Attention was also given to post-delivery maintenance and warranty service, and they assisted school officials in obtaining title, registration, and Highway Patrol safety inspection for the new buses.

In addition, the coordinators served as trouble shooters on problems related to dealer service, manufacturing defects, and missing optional equipment. Other activities included maintenance cost analysis, garage facility utilization studies, and supply bidding procedures as well as assisting in providing special instruction for local transportation supervisors and mechanics concerned with technical aspects of school bus maintenance.

During the now slightly more than one year that the regional coordinators have been at work their influence in bringing about improved reporting by school districts to the State Department of Education for transportation operation reimbursement funds is particularly evident. At countywide meetings the coordinators were able to explain the reasons for specific procedures and to answer questions regarding the reporting forms. All forms were filed through the coordinator's office where they were audited and forwarded to the State Department for calculation of state assistance. When the audit procedure detected errors, the reports were referred back to the school districts for correction prior to forwarding to the State Department.

In the coming year, the coordinators will conduct a complete audit of the Foundation Program reporting forms upon which

state school support is based. This will permit a more accurate calculation of state assistance to school districts and facilitate the state's computer-based accounting and distribution system.

Looking even further into the future, it is likely that the activities of the coordinators will continue to be broadened in both scope and function. The concept of regional offices of the State Department of Education opens many new horizons for service. Looking back over all that has been accomplished in one year, it is apparent that the success of the coordinator program was due in large part to the leadership exerted within the State Department of Education and the careful planning which went into setting up guidelines before any premature attempt to implement the program was made. The ability of each coordinator to work closely with the school officials in his region and to provide the necessary know-how at times when such knowledge was crucial to efficient operation shares equally as a reason for success.

Ohio has learned that regional coordinators can play a vital service role. Their work has contributed mightily to the state's desire to improve its total educational effort.

Developing a State Plan for

PENNSYLVANIA'S INTERMEDIATE UNITS

Paul S. Christman

PENNSYLVANIA, just as other states, is concerned that its state system for public education be responsive to new and changing demands and circumstances and able to meet the educational needs of all children and communities throughout the Commonwealth. Developing such a system has required a major overhaul of the configuration of local school administrative units and has brought on a reorganization of the State Department of Public Instruction. These changes in turn necessitate change of the intermediate level of organization. Accordingly, the General Assembly authorized a study and assigned responsibility to the State Board of Education for developing a State Plan of Intermediate Units for Pennsylvania. For more than a year this study has been in progress. Reported here are highlights of some of the background, considerations, and recommendations of this study.

HISTORICAL BACKGROUND

Documenting the development of public education in Pennsylvania necessarily begins with the adoption of the Constitution of 1776, but it was not until the Free School Act of 1834 that it gained much headway. Although this enactment was protested vigorously throughout the state, it had enough legislative support to survive repeal efforts the following year. Thus, the venture into free public education was begun and a statewide network of local school districts was established. Typically these

Dr. Christman is a member of the Pennsylvania State Board of Education and served as Chairman of the Board's Committee on Intermediate Units.

districts were small, established within walking distance for children in a predominantly rural setting and limited to what we now regard as elementary education.

The County Superintendency

Many problems plagued those early years of a developing state school system. In recognition of the need for some type of coordinating and supervisory leadership, the Legislature in 1854 approved an Act creating the county superintendency. Anticipating local opposition to state "interference" in the schools, the Legislature provided that the county superintendent be elected by representatives from local school district boards of directors (the Pennsylvania equivalent of school boards). Protest came, nevertheless. The Act was immediately greeted with open and violent opposition, and though a repeal effort failed, the school directors, forced to elect county superintendents, expressed their disapproval by establishing unbelievably low salaries—$50 a year in Sullivan County, with Lancaster County paying the great future educational historian, J. P. Wickersham, $1,500 for his first year of service.

The Act prescribed that the county superintendent visit schools "as often as practicable, to examine and certificate teachers, to see that the courses prescribed by law be taught and, if any were made available, to distribute State monies to local school districts." Conceived in necessity, born in a storm of protest, unwanted and scorned, the county superintendent had an ignoble beginning in Pennsylvania. Of this hostility Wickersham wrote: "While the ill feeling toward the office lasted, the county superintendents, in performing their works, had to row against a strong, rough tide. Their examinations were unjustly criticized, their visits unwelcome, their advice detested and most often unheeded, even their presence was considered an offense. Under these circumstances, the weak did nothing, the timid shrank from the conflict, and none but the brave could make a fight with the hope of winning it."

Thanks to the brave, the county superintendency withstood constant storms for repeal. It saw the one-room schools consolidated and was both midwife and mother hen to the secondary school. It pioneered transportation and school bus routes; extended the school day; lengthened the school year; brought realism into teacher certification; broadened, improved, and enriched the curriculum; conceived and nurtured special educa-

tion programs; fostered and supervised vocational education programs; exhorted for technical and continuing education; and so forth. In every endeavor the fingerprint of the county superintendent's ever helping hand was present, though not always discernible.

In those years the county superintendent was, in a sense, an administrator for the local school districts. Insofar as this was his role, it was logical—or seems so looking back—that if he did his job well he would work himself out of it. Local school districts, well developed, would be able to carry on themselves many of the functions initiated by the county superintendent. When this stage of development was reached, a new position at the local school district level would be needed.

School District Reorganization

The county superintendent was Pennsylvania's sole administrator and supervisor of schools until 1867. In that year the Legislature transferred part of his jurisdictional responsibility when it created the position of local district superintendent independent of the county office. As local districts grew, merged, reorganized, and gained ever greater scope in educational and administrative functioning, the administrative functions delegated to the county office diminished, until by 1931 only the sparsely populated fourth-class districts were left under the direct supervision of the county superintendent.

With the need to provide secondary education opportunities for all children in the state, the small districts which had served in previous years were no longer adequate and the pressure to speed up school district reorganization increased. The county school office was destined to play a key role in this process. The 1937 merger act and its 1947, 1953, 1961, and 1963 successors all charged the county board of school directors, of which the county superintendent is chief administrator, to prepare a countywide plan for the organization of administrative units, that is, for the reorganization of the state's school districts into larger, potentially more efficient school districts.

These reorganization efforts have created a new operational framework throughout the state. During the 1963-64 school year there were 2,056 school districts which had been grouped in various ways to operate as 956 separate local school systems. Of that number, only 192 were administered independently from the county school office. During the present 1966-67 school year,

as a result of mandatory school district reorganization legislation (Act 299 adopted by the General Assembly in August 1963), there are a possible 466 school districts, of which all but 29 are eligible to elect a district superintendent. Thirteen of the state's 66 counties have become single school districts and 39 counties contain six or fewer school districts.

Thus today almost all of the teachers and public school pupils are under the direct supervision and administrative arm of a local district chief school administrator, a school official independent of the county superintendent. It is only seeming irony that the present state of the intermediate unit in Pennsylvania is a direct result of the leadership expended by the county superintendents to produce or re-establish a more efficient administrative base for the state's educational program through the machinery of school district reorganization.

Previous Reform Efforts

The relationship between the reorganization of local school districts and the ultimate need to reorganize the structure and functioning of the county school office has been recognized by some state leaders for many years. Numerous studies and efforts to bring about needed change have been attempted. A statewide conference was held in 1937 to study the potential of the county office as a service unit, but no substantial reform proposals came from it.

In 1955 the General Assembly appropriated funds for a comprehensive study of the problem together with a directive for the preparation of a state plan. The Intermediate Unit Commission conducted extensive research, developed a reorganization plan, and wrote a proposed bill (Senate Bill 525) which was introduced in 1957. While the proposed legislation had much merit and substantial support at the beginning of its short life, opposition to it grew, even among county superintendents, and the bill failed.

In 1963, when the results of the 1961 school district reorganization legislation appeared almost certain to eliminate all districts which remained under the jurisdiction of the county office, the county superintendents prepared a legislative proposal to reorganize the state into perhaps 36 intermediate units rather than the 66 county school offices. The bill failed to be reported out of committee.

Then in 1964, with the situation resulting from local district

reorganization indicating more positively than ever before that some major modification of the intermediate level of organization was needed, the county superintendents in cooperation with the Pennsylvania Association of Chief School Administrators appointed a committee which prepared a new proposed intermediate unit bill and had it introduced in the General Assembly in 1965. It also remained in committee and no legislative action was taken.

When the legislature fails to act, the existing structural inadequacies tend to persist. They don't go away. What had happened in reorganizing local school districts pointed up clearly that there was no longer much need for a middle echelon of organization to administer and operate schools. On the other hand, increased demands are being made of the education system resulting in the need for highly specialized services which cannot be provided well by either the State Department of Public Instruction or a local school district. The growth of such activities as national curriculum development projects, research and development centers at universities, regional learning laboratories, and many new state-served activities, creates the need for an effective system of coordinating these separate and diverse efforts and bringing them to the school district. Some kind of intermediate unit to provide such services to school districts seemed essential for Pennsylvania.

A new effort to reorganize the county school offices seemed absolutely essential. During the 1965 General Assembly session, Act 83-A emerged and, in addition to appropriating funds to finance a study on the intermediate unit, charged the State Board of Education to prepare a plan for intermediate units for Pennsylvania and submit its plan to the General Assembly by January 1967.

CONDUCTING THE STUDY

Pursuant to the legislative mandate, the Chairman of the State Board of Education appointed a State Board Committee on Intermediate Units consisting of five State Board members. Three separate subcommittees were also appointed to serve as task forces on specific topics: the role of the intermediate unit, legislation, and finance. Members of the overall State Board Committee served as chairmen for each task force committee.

To assist in the conduct of the study, three additional special

groups were established. Each of a number of statewide professional and lay associations and agencies was invited to nominate a representative to serve on a *General Advisory Committee*. A second group called for by the provisions of Act 83-A was a *Legislative Advisory Committee* made up of members of the House committees on elementary, secondary, and higher education and the Senate committee on education. The third group established was the *DPI Resource Committee* made up of staff members of the Pennsylvania Department of Public Instruction. The Superintendent of Public Instruction was asked to appoint to this committee staff members from the several departmental areas that were most closely related to the envisioned services of a new type intermediate unit.

It should be apparent that such a series of committees and subcommittees not only divided the assignment into manageable parts but also provided for the involvement of a wide range of educational interests. At the regular meetings held throughout the course of the study, members of all committees were in attendance to receive progress reports and briefings, to react to specific problems and questions, and generally to advise and suggest ways to achieve the goals toward which the study was directed.

The progress of the study can be simply illustrated by describing two phases of its progress. One of these involved a special task force of five staff members of the state department's Bureau of Curriculum Development and School Evaluation. This team traveled some 16,000 miles to visit 12 intermediate units which had been recommended to the State Board Committee as above average operations. Systematically they observed both the organizational characteristics and service programs of these regional agencies, summarized their findings, and fed this information into the overall study.

The second phase was the development of a Draft Report by the Task Force on the Role of the Intermediate Unit. This Report was released early in May 1966 and was the subject of a public hearing in Harrisburg later that month. Eleven organizations presented testimony regarding the proposals of the Draft Report. While the suggestions of this Report ranged broadly, the two criteria it included for the proposed intermediate units might be singled out as illustrative of its content. They are (a) the number of public school children enrolled in kindergarten through grade 12 and (b) the ease of travel within each

Intermediate Unit. On the first, a minimum of 100,000 pupils was proposed as an adequate number for efficient administration. On the second, it was indicated that travel time of more than one hour from the office of the Intermediate Unit to any school district in the service area seems inefficient. The report recognized that population density, road networks, and topography are major factors in determining the ease or difficulty of travel. It further emphasized that *both* criteria should be employed by the State Board of Education in its determination of the State Plan of Intermediate Units, that in some situations the number of pupils might be the dominant factor while in others it would be travel time.

The favorable reception given the Draft Report by county superintendents, district superintendents, supervising principals, school directors, and representatives of other significant statewide organizations was most encouraging to the State Board Committee. The public hearings developed testimony that in general supported the Draft Report. It was cited as a "commendable report," "basically sound," and one with which the organizations could concur "in spirit and principle." It also pointed to several items that merited additional attention by the Committee, and these were given further study. The Board and the Committee were commended for evidencing "forward-looking leadership" and for exercising an approach "both sensitive and comprehensive."

Despite this favorable reception, there was much work yet to be done during the months which followed—many specific recommendations to be developed, details to be worked out, problems to be explored and resolved, a report to be developed, and much more. Consequently there were many more meetings, more hearings, and many additional suggestions. But finally the study was completed, and as a State Plan of Intermediate Units was presented to the State Board of Education. On January 12, 1967, the State Board adopted the study and its recommendations.

RECOMMENDATIONS

Anticipating legislative enactment by the General Assembly during its 1967 session, the State Plan is based upon having July 1, 1968, as the effective date for the newly created Intermediate Units. The first year of their operation would necessarily be devoted to (a) providing those essential services which would

need to be continued without interruption during the transition from county units to Intermediate Units and (b) planning and developing the program which the new agency would operate during the following year. The general functions in which all Intermediate Units would be engaged would be consultative, advisory, or education program services to school districts—ancillary services necessary to improve the state system of education.

One of the important aspects of the Plan is its insistence that all school districts shall belong to and be entitled to the services of an Intermediate Unit. This was achieved, in part, by designating the two major cities in the Commonwealth, Philadelphia and Pittsburgh, as single school district Intermediate Units.

A Twenty-Five Unit State Plan

The two basic criteria identified earlier as part of the preliminary Draft Report—a minimum of 100,000 pupils enrolled in kindergarten through grade 12 and a maximum of one hour travel time from a central location within each Intermediate Unit to any of its constituent local school districts—were used in the development of the State Plan. Obviously these criteria work counter to each other; in most areas of the state, achieving either one requires violating the other. Nonetheless, the criteria were extremely helpful in developing a plan to fit the geographic and population distribution variations. Both criteria can be met in some areas. In others a compromise was necessary so that each would be met in part.

The Plan developed consists of a statewide network of 25 Intermediate Units. See Figure I. Exclusive of Philadelphia and Pittsburgh with approximately 295,000 and 85,000 pupils respectively, the pupil population of these proposed Units ranges from slightly less than 30,000 children in two Units in the mountain area (Units No. 9 and 11) to over 230,000 in the metropolitan area surrounding Pittsburgh (Unit No. 3). Nine of the proposed Intermediate Units exceed the 100,000 pupil goal; only four have fewer than 50,000 children. Not counting the two single-district major city areas, the number of local school districts in the proposed Units ranges from 9 (Unit No. 11) to 45 (Unit No. 3), with a median for all Units of 16 local districts.

One of the significant aspects of the State Plan is its contemplation that boundary adjustments may need to be modified in the future to accommodate population shifts, further school district reorganization, and other developments. To accomplish

BEST COPY AVAILABLE

FIGURE I—INTERMEDIATE UNITS AS PROPOSED FOR PENNSYLVANIA BY THE STATE BOARD OF EDUCATION

this, the Draft Report emphasizes the importance of assigning to the State Board of Education responsibility for determining and changing Intermediate Unit boundaries rather than having them established by legislative enactment. This will permit the Plan to be responsive to changing conditions and give the Board a degree of flexibility for establishing and maintaining a plan which will best serve school districts.

Organization and Staffing

Each Intermediate Unit will have a nine-member Board of Directors chosen for overlapping terms of three years from among the members of the school boards of school districts comprising the Intermediate Unit. Unless there are fewer than nine school districts in the area (as is true only in the single-district Units of Philadelphia and Pittsburgh), at no time shall more than one director from any local district serve on the Intermediate Board. The election of members to the Board will be by a proportionate ballot with each district's share of the total vote being the relationship its weighted average daily membership is to the total of the intermediate area.

Among the responsibilities specified for the Intermediate Unit Board of Directors are: the selection, appointment, and determination of the salary for its chief administrator; approval of all professional staff appointments; adoption of salary schedules for all Intermediate Unit professional and nonprofessional staff; approval of the program; approval of the budget; and such other duties as may be required by State Board regulations.

The staff of each Intermediate Unit shall consist of a chief administrator to be known as the Executive Director, one or more Assistant Directors, and such Specialists as may be needed to carry out the program of services which will be developed. The terms of appointment for the Executive Director and for Assistant Directors will be four years and they will be commissioned officers. No specific term is given for such Specialists as may be employed, although they will be eligible for tenure.

To assist in the transition from the present county school offices, the Plan recommends that all persons employed by the Intermediate Unit other than the Executive Director and Assistant Directors during its first year of operation shall be selected from those personnel employed during the 1966-67 school year in the county offices comprising the Intermediate Unit, but only

as the need for their employment exists. The Executive Director and Assistant Directors may be selected from incumbent county office personnel, but this is not required.

Service Programs

The recommendations of the Committee on Intermediate Units recognize that certain services currently operating under the direction of county school offices need to be continued, and it may well be necessary for the new Intermediate Units to assume responsibility for their continuation until they can be phased into some other organizational framework. It is recommended, for example, that many parts of the programs provided for exceptional children can and should be transferred to local school districts. Only those special education programs where the nature of the exceptionality limits the number of pupils needing the program, or where high degrees of specialized staff and facilities are required, are anticipated as appropriate for long-range Intermediate Unit operation. In the same way, vocational and technical education programs would be transferred as soon as practicable to a joint committee elected from among the several participating boards of school directors.

In addition to ensuring the continuance of these existing programs, the major function of the Intermediate Units during their first year of operation would be planning for and developing a program for the 1969-70 school year. This would involve a careful review and analysis of the educational services now being offered within the geographical area of each Unit, including those provided by districts, county offices, colleges and universities, nonprofit cultural agencies, and the Department of Public Instruction, and a high degree of involvement of representatives from local school districts of the Unit in the process. This type of inventory of existing services and an analysis of their strengths and weaknesses along with the identification of voids is considered basic to the planning of effective Intermediate Unit programs.

It is expected that the program developed by each Intermediate Unit will vary according to the educational needs of the school districts to be served by the agency. The Draft Report outlines a number of specific service areas for these Units, but ultimate determination of the extent and nature of each program would be a responsibility of each Intermediate Unit Board

of Directors based on the desires and recommendations of constituent districts. The service areas identified and described in the Report include administrative services, curriculum development and instructional improvement services, research and planning services, instructional materials services, continuing professional education services, and pupil personnel services. Within these general areas such specific activities as helping with the planning and conduct of pilot projects, assisting in the preparation of project applications, providing curriculum consultants, operating an instructional materials library and production center, providing in-service staff development programs, serving as a clearinghouse for many kinds of information, providing liaison between the schools and institutions of higher education, and many others are suggested.

One of the important components of program planning is the Draft Report's recommendation that the State Board of Education provide by its regulations for an Intermediate Unit Council in each Unit, to be composed of all chief school administrators within the Unit. This Council would serve in an advisory role to the Executive Director of the Unit. The advisory function has special significance to program planning because the proposed program, in addition to being dependent on the approval of the Intermediate Unit Board of Directors, must be approved by a majority of the school districts in the area in order to qualify for state funds.

Financing the Intermediate Unit

The State Plan includes specific recommendations for the financing of the Intermediate Units. While their eligibility to receive federal funds is anticipated, the recommendations cover only two sources: funds from the state and funds from local school districts.

Two types of state subsidies to the Intermediate Units are recommended in the Report: a general operating subsidy and a capital subsidy. The general operating subsidy is designed on an equalization basis to provide major support for the service program. The formula proposed takes into account both the number of pupils in the regional area and the area's combined ability (on a formula basis) to support educational programs. The state aid ratio computed annually for each Intermediate Unit would be determined in the same manner as it is now for local school districts. The fund allocated under this operating subsidy would

be distributed annually in advance payments in July and December. The capital subsidy would be applied against leases entered into by the Intermediate Unit for office space, classrooms, buses, garages, warehouse space, equipment, and similar facilities. Such leases would require preapproval by the Superintendent of Public Instruction in order to qualify for state subsidy.

Two characteristics of the state subsidy program are worthy of special note. As indicated earlier, the service program of an Intermediate Unit and its supporting budget are subject to the approval of *both* the Intermediate Unit Board of Directors and a majority of the school districts in the area it serves. With such approval, both the proposed program and the budget are forwarded to the Superintendent of Public Instruction to permit budgetary review and approval. If the budget is greater than the amount of the state subsidy, the prior approval required obligates all the local districts in the Intermediate Unit for a sharing of the costs in excess. The second special feature of the proposed Plan is an assurance that in no instance would an Intermediate Unit receive less in state funds than the combined amount received during the 1966-67 school year by the county school offices which it replaces.

It is probable that in nearly every Intermediate Unit there will be school districts needing and wanting certain services which would not be similarly needed or requested by other districts. In any instance where less than a majority of school districts desire to participate in a specific service program, those wanting the service may contract with the Intermediate Unit for it. The cost of such service would be paid by the contracting school districts in terms of the contract agreement.

IMPLEMENTING THE PLAN

The State Board of Education has adopted a State Plan of Intermediate Units as directed by the General Assembly. Following the enactment of legislation the State Board will adopt regulations and guidelines for the establishment of Intermediate Units. The reorganization contemplated would greatly strengthen Pennsylvania's educational system. Its new configuration of local school districts together with stronger and more flexible Intermediate Units and a more vital State Department of Public Instruction will greatly improve its ability to deal with the ever expanding educational programs the decades ahead will bring.

Abstracted Separately as ED 018282

The California

COMMITTEE OF TEN REPORT

Polly Carithers

SINCE 1947 when California established the county school service fund, a substantial portion of that state's financial resources has been channeled to county school offices for the support of educational services provided to local school districts. The procedure permitted some pioneering interdistrict programs to develop and demonstrated the efficiency and effectiveness of the approach. While the initial objective of equalizing educational services for smaller school districts has fallen far short in many instances, the investment of state financial help has been highly successful.

California's diversity tends to complicate any statewide approach to equalization, however. Its 58 counties range in size and structure from Los Angeles County, made up of 85 separate local school districts having a combined enrollment of more than 1.6 million students, to Alpine County, now a single school district with a total enrollment of just over 100 students. Six of the counties have combined local school district enrollments of fewer than 2,000 students, and four counties (not including San Francisco) are currently single districts. Thirteen counties are projected to become single school districts in the state's master plan for school district unification.

In addition to these differences deriving largely from geographic factors, population distribution, and progress in school district unification, organizational variations have developed among the county school offices as a result of permissive legis-

Mrs. Carithers, Program Analyst for the Oakland County, Michigan, Schools, prepared the original draft of this article.

lation and local initiative. Sonoma County, for example, has utilized a 1963 statute giving the County Board of Education taxing power and thus making it the first fiscally independent county education office in the state. San Diego County, a charter county, amended its charter by local action in 1946 to except it from the state law requiring the election of the county superintendent of schools. Since that time the San Diego County Superintendent of Schools has been appointed by an elected board of education. The same arrangement by charter amendment became effective in Santa Clara County in January 1967. In two other charter counties the county superintendent is appointed as a civil service official. In all other instances, the superintendent is an elected county official.

To overcome some of the limitations imposed by county boundaries, operational programs have been developed on a multicounty basis in various parts of the state. Currently, a number of different kinds of multicounty alignments are functioning. While most are highly effective in a program sense, they are largely without pattern and are held together by little more than mutual understanding, willingness, and convenience.

These different organizational and operational patterns are illustrative of many which have been subject to a continuing series of studies and reports. In nearly every instance, existing inadequacies in intermediate unit organization and functions have been identified and recommendations for correcting them advanced. Some changes have been made—establishment in 1955 of elected county boards of education in all counties, for example —but most of the recommendations of past studies have lacked the support needed for implementation.

The most recent of this series of studies was authorized in March 1965 by the joint action of the California Association of County Superintendents of Schools and the County Boards of Education Section of the California School Boards Association. Each association appointed five members to serve on the study committee, a group which from its establishment has been known as the Committee of Ten. The Committee was given responsibility "to conduct a research study of the size, structure, role, and function of the intermediate unit and its Board of Education."

The following portions of this paper are in essence, though not always in exact wording, excerpts taken from *The Future of the Intermediate Unit in California*, published in September 1966 as the Committee's final report.

THE FUTURE OF THE INTERMEDIATE UNIT IN CALIFORNIA

submitted by "The Committee of Ten"

Structure and Organization

The intermediate unit should be developed as a local education agency rather than a regional office of the State Department of Education. A unit locally oriented is more capable of meeting the needs of individual school districts. Any proposal to regionalize the state with eight to ten branch offices of the State Department of Education would be a step backwards, leading inevitably to bureaucratic mediocrity and to the deterioration of the educational effort on a statewide basis. To prevent the intermediate unit from developing into a regional office of the State Department of Education, it is imperative that it be governed by a locally elected lay board of education, as is presently provided for in law. This board should be responsible for the establishment and control of its budget and for policy making. Election of the board makes the office responsive to the wishes of the public who are residents within the area and subjects its actions and policies to local public scrutiny.

It is essential that, as its administrative and executive officer, the superintendent of the intermediate unit be appointed by the board of education. Changing the county superintendent of schools from an elective to an appointive position, with establishment of his salary by the board of education, is not revolutionary but evolutionary, and would be in accord with the organization of school districts throughout the state. It will not deprive the electorate of its opportunities to express approval or disapproval of the actions of the office because they would be well able to act, as is presently permitted in the local district, through their locally elected representative to the board.

The procedure would have the advantage of permitting the locally elected board to select the best qualified man for the position irrespective of his area of residence. It would prevent conflicts of serious proportions between an elected official and his elective board with the resulting stalemate and disruption in the function of the office. Appointment by an elected board would also be in keeping with standard governmental procedures where an elected policy-making board selects its chief executive or administrative officer.

In the emerging organizational patterns there are numerous cases where two or more adjacent counties join in a contractual arrangement for selected services on a multicounty basis. The suggestion that county school offices in specific geographical areas be combined into a single office to serve two or more counties is widely supported. While the constitution now permits legislative authorization for the election of a single county superintendent of schools for two or more counties, it is not possible under existing legislation to elect a single board of education. If two or more counties are to be combined into a single intermediate unit, a change in legislation relative to the election of the governing board would be required.

Criteria for Determining the Intermediate Unit

There are many criteria to be considered in establishing intermediate units. Those listed below generally are accepted as being pertinent although no proposed unit would be expected to meet all of them completely:

1. Equality of educational opportunity requires that intermediate units be extensive enough to offer the services needed by a district which is unable to meet adequately the needs of its children because of sparsity of population, impoverishment, large concentrations of population with culturally deprived children, or other fundamental constraint.
2. Such factors as distance, topography, road patterns, density of population, climate, occupational diversity, ethnic composition of the population, social diversity, social unity, and economic resources should be taken into account in proposing intermediate units.
3. The intermediate unit should be small enough to facilitate communication, coordination, and sensitivity to local community differences.
4. The intermediate unit should have a sufficiently large number of pupils, teachers, schools, and school districts to enable it to provide efficiently and economically a broad range of services.
5. The intermediate unit should be large enough to have the resources to attract and hold the highest levels of educational leadership.
6. The intermediate unit should be organized in such a way that it can raise the level of competence of its staff to meet

the higher qualities in leadership which will be required as larger districts are created through population growth and school district reorganization.

7. The intermediate unit should be related to other governmental structures of the state.

The Flexible Intermediate Unit

In a time of rapid technological and social change, there is need in the overall administrative structure of public education for a unit with the ability and responsibility to respond to new problems and new programs. While a regional intermediate unit other than the county does not now exist in California, a significant development has been the appearance of a new form of regional organization where two or more county offices of education combine efforts to perform certain tasks. This form of regionalization is a highly flexible one in terms of duration, number of counties involved, and number and types of tasks performed. Because of its flexibility it can carry out programs which would not be possible under any other form of organization, such as the combination of county offices or the establishment of regions within the state to replace the county offices.

This cooperative concept allows each of the 58 county offices in California to remain autonomous and yet to serve as building blocks in various regional activities. The building block idea allows for a multitude of regional arrangements over varied time periods to meet specific needs of the local school districts. A county may participate in several regional activities—each of which may have different groups of counties participating. This idea is referred to as the *flexible intermediate unit* concept.

While cooperation between and among counties had its beginning early in California history, cooperative activities have increased dramatically since 1960. Four different intercounty regional alignments involving Mendocino County illustrate the flexible intermediate unit approach. That county and Lake County have been combined since 1943 in a program of audio-visual services providing a central staffed library and weekly delivery and pick-up of materials for each school in the two-county area. Mendocino and Sonoma Counties began a joint program in 1965 for consultant services in physical education. Mendocino County joined with four other counties during 1964 and 1965 for conducting a workshop for all special education teachers in the five-county area. It is one of 13 counties which

have formed BRITE, Bay Region Instructional Television for Education, which with the assistance of San Francisco's KQED makes in-class television available to all of the schools in the region.

In addition to flexibility and recognition that different services require a somewhat different operational base, the cooperative regional activities make services available which would probably not be available from a single county and provide a saving of money and personnel time. The study identified 122 separate cooperative activities. In 83 of those reported, some type of joint decision-making and planning group was responsible for carrying out the cooperative ventures. In the case of short-term projects, such as a two-day in-service educational conference, administrative personnel from the counties involved would meet as many times as necessary to plan the meetings. For long-term activities, like a regional television station, a permanent governing body of some type was established. In the remaining 39 situations, county superintendents entered into contracts for certain services, exchanged personnel for equal time periods, or simply exchanged instructional materials.

From an analysis of a sample of these cooperative activities, the following general conclusions were reached:

1. In cooperative activities the administrative practice is for each county involved to name a person who serves on a policy-determining and decision-making board of management.
2. Cooperative activities should be administered as though the areas being served were a single unit. The responsibility of administration must rest with one office, with other counties involved performing policy-making and facilitating roles. This type of arrangement should result in a uniform service throughout the cooperating area.
3. When cooperative activities are undertaken, written plans for their administration should be prepared and distributed to all parties involved. The written statements should include goals and purposes, roles and responsibilities, financing, channels of communication, and feedback systems.
4. Cooperative activities performed on a regional basis are providing functions not possible on a single-county basis in many areas of the state. The practice should be strengthened.

A dynamic, flexible intermediate unit that is task-force oriented, can respond to the work load demands of new assignments. Flexibility enables the planning of new solutions to old problems through new combinations of resources, e.g., the development of a new array of cooperating counties, districts, agencies, or personnel. It also aids in meeting new tasks that emerge as a result of legislation, technological change, or a reassessment of priorities. Cooperative agreements, task forces, and financial leeway are essentials for the kind of dynamic flexibility which enables staffing for action at the growing edge of education.

Role and Function

There is no set pattern which can be applied uniformly throughout the state to determine those functions or services which belong to the local school district and those which are properly a responsibility of the intermediate unit—conditions vary. The number of districts involved as well as their geographical size and density or sparsity of population are mitigating factors.

An ever-decreasing number of local districts are so small and weak that it is still necessary for the intermediate unit to provide special education classes and psychological and health services for them. Districts should be encouraged to provide such services for themselves when they are able to do so. At the same time, certain services or functions traditionally performed at the local district level may be performed more efficiently by the intermediate unit or some regional office. Use of electronic data processing equipment in the preparation of school district payrolls and for pupil attendance accounting are specific examples. The provision of such services from outside the district does not need to be in conflict with the concept of local control.

Regardless of the size of local school districts, an intermediate unit relatively close to the school districts is a necessity. It has an important role in such services as in-service education, developing courses of study, instructional materials, instructional television, research, special education, data processing, and a broad range of business and administrative services from record keeping to quality control. One of its unique functions may well be that of planning. It is in an advantageous position to identify the emerging and changing demands of society and to plan a

strategy through which to attack problems on a broad multi-district approach.

Probably the most important functions of the intermediate unit are coordination and leadership. These are not authoritarian roles. Working with school districts in seeking solution of educational problems requires information, skills in human relationships, and other talents. If the integrity of each local school district is respected, the success of the intermediate unit as a coordinating agency must depend on factors other than authority.

It is recognized that the state, the intermediate unit, and the local school district have different roles. In terms of policy making, the State Board of Education has broad authority for many important policy decisions on a statewide basis. The governing board of the local district has full authority for management of the local school district and in this role has broad policy-making power for decisions within the local district. Uniquely, the intermediate unit on the one hand is an administrative arm of the State Board of Education, although it does not determine policy in that role. At the same time, it is a coordinating and service agency for local districts taking care not to impinge on the authority of the governing boards of those local districts. Its own policy-making role is that which governs its own operation and those areas specifically defined in law.

Financing the Intermediate Unit

Funds appropriated by the state under a formula-in-law should be sufficient to guarantee in every intermediate unit a program of strong educational leadership and services. The budget determining the use of these funds should be under the control of the intermediate unit board of education and not the State Superintendent of Public Instruction. There also should be a provision that reasonable balances can be carried forward from each prior year to guarantee opportunity for an adequate program without building up unreasonable unused reserves.

Just as there are school districts fostering lighthouse programs, the financial structure should create a potential for lighthouse intermediate units. This could be done by the provision of funds for innovative programs from unallocated state service funds, on the basis of prior approval of the State Superintendent of Public Instruction and the State Board of Education; or provision may be made for the governing board of the intermediate

unit to raise local tax funds for programs going beyond what the state formula-in-law provides.

All services now required by law to be financed out of the county general fund or out of taxes levied to support budgets of fiscally independent county boards of education should continue to be supported entirely from those sources.

There is agreement that the educational function of the intermediate unit should be financed primarily out of state funds and that these funds should be apportioned on the basis of a formula-in-law. Needs of education in the state can be met most advantageously with state funds apportioned through a formula which permits the governing board of the intermediate unit to determine how the funds should be utilized.

At present, in the field of instructional materials, practice varies on methods of financing. School library service, when it is provided through the office of the county superintendent of schools, is financed primarily out of district contributions; on the other hand, districts are required to provide at least 50 percent of the cost of audiovisual materials when these are supplied by the county office. Whether county service funds should continue to support audiovisual materials on this basis needs evaluation. Practice varies in the state. Some very large school districts are a part of a county audiovisual service. In other cases, districts of comparable size are providing their own audiovisual materials. Equity is not provided. Technological development, as well as equity, requires that this problem be studied and that a new solution be found for it.

Another inequity exists in the law on apportionment of county school service funds. This law has provided that direct-service districts receive $10 per average daily attendance less than larger districts, on the theory that the larger districts would provide for themselves services that are provided by the county superintendent of schools in the smaller districts. Ninety-three percent of the county superintendents report that typically districts which pass from direct-service size request, need, and receive more service from the county office after they have passed out of the direct-service size than when they were smaller. Law relative to this problem should be changed to make it possible to serve all districts as the need arises.

It is recommended that the legislature, through an incentive formula, make it possible for the county office to improve the quality of its services as district unification occurs, so that the

quality level can adequately serve the needs of the new district.

There is agreement that year-to-year contracts should be no more than a minor part of financing intermediate unit service operations. Year-to-year contracts are untenable from the districts' standpoint, since when they most need help they can least afford to contract for it. Further, year-to-year contracts are conducive to poorly planned district programs and are unrealistic for staffing, as they make it difficult to attract the best qualified people. The educational services provided from the intermediate unit must in the main be state financed.

The intermediate unit should be encouraged to remain dynamically flexible to help districts adjust to the changing needs of education. It must be able to move where the "brush fires" are if equalization of educational opportunities is to be realized. A formula-in-law on apportionment of state funds to the intermediate unit will permit a level of flexibility which is not possible under present line-item procedures.

Conclusions and Recommendations

It is essential in California that there be an intermediate unit operating between the individual school districts and the State Department of Education. In many instances it is the function of the intermediate unit to carry out the state's role and responsibility in public education. Its major function, however, is to serve as a coordinating and regional service agency for local districts. The intermediate unit should provide leadership, support, and services to all districts, regardless of size.

No definite pattern can be applied throughout the state in determining which specific functions or services belong to the local school district and which should be provided by the intermediate unit. On the other hand, the function of coordinating educational activities with community and governmental agencies is emerging as essential for the intermediate unit.

The locally elected board of education of a county or intermediate unit is a policy-making body within the framework of state law and should be continued and strengthened. This body should have full authority for its own budget and possess fiscal independence similar to a district governing board. The election of a superintendent of schools is incompatible with election of a governing board. The superintendent of the intermediate unit should therefore be appointed by the governing board and be its chief administrative officer. This will require constitutional

revision. The board should also have authority to set the salary for that position.

The governing board of the intermediate unit should have broad contractual authority. In addition to clear authority to be a party to joint powers agreements, it should have authority to enter into contracts with private agencies to accomplish purposes falling within the area of responsibility of the board.

Each of the six regions of the state (established within the California Association of County Superintendents of Schools) should submit a plan for the region which will best serve the children of California by providing the most dynamic and effective intermediate unit arrangement. Pilot programs which unite, operationally, county school service fund programs into an intermediate unit which encompasses more than one county should be conducted. The law should be changed to permit two or more counties to have one intermediate unit board of education elected from the entire area.

The intermediate unit of the future should be structured and financed in such a way that it can serve effectively as (a) a planning office, capable of identifying emerging and changing demands of our society; (b) a quality control center for the state system, serving as the major renewal unit for controlling obsolescence of personnel, material, and equipment; and (c) an agency having the responsibility for coordinating the identification of problems needing research and the resources with which to attack these problems.